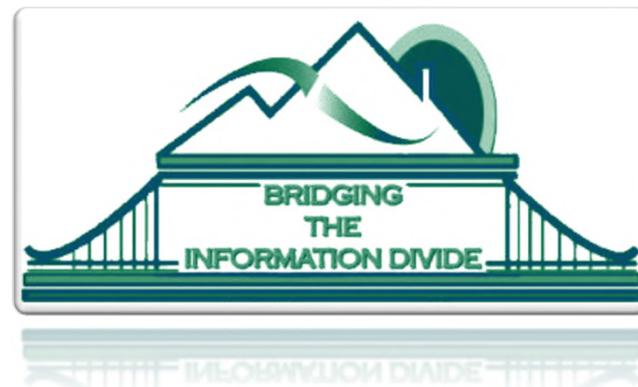




HUD Office of Housing Counseling Stakeholder Meeting



Role of Intermediaries in the Housing Counseling Program

January 21, 2014



Webinar and Conference Logistics:

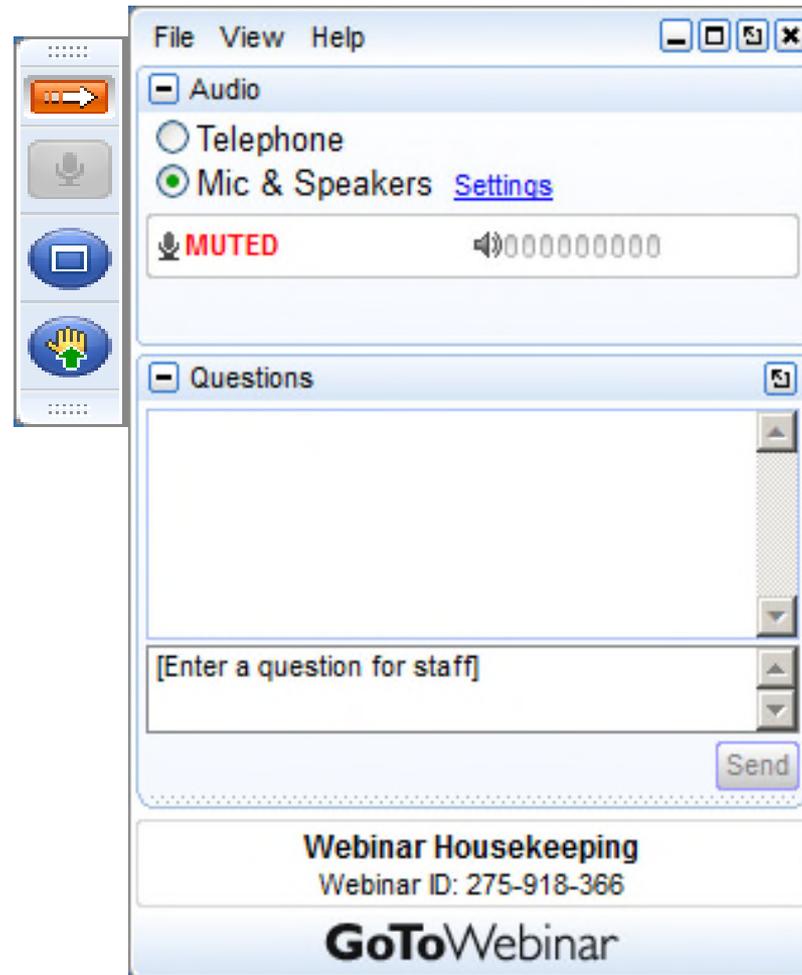
Conference Phone Dial-in: (866) 576-7975

International Dial-in: (760) 569-7000

Access Code: 342653

- Audio is Recording
- Attendee lines are muted during presentation
- There will be discussions and time to ask questions
 - The operator will ask for people who want to make a comment, please follow the operator's instructions at discussion and Q&A times
 - If unmuted during Q&A, please do not use a speaker phone
 - Please do not use "Hold" button if it will play music or other disruptive announcements
- Poll Questions will appear on screen

GoToWebinar Interface:





Welcome

Ruth Roman

Senior Program Advisor
Office of the Deputy Assistant Secretary
Office of Housing Counseling



Agenda

- Purpose of Stakeholder Meetings
- Presentation of OHC Intermediary team project proposals
- Intermediary organizations provide feedback on OHC proposals and offer other ideas for HUD assistance and support

Stakeholder Meeting Purpose

- Provide the opportunity for communication and interaction
- Evaluate stakeholder input on program policy and procedures
- Share best practices and challenges
- Provide valuable insight for the OHC to help consumers achieve housing goals
- Provide advice to leadership of the department as it relates to housing legislation, regulation, policy development, budget, training, program evaluation and oversight



OHC – Role of Intermediaries

Stephanie Williams

Housing Specialist
Office of Policy and Grant Administration



OHC – Role of Intermediaries

- OHC's review of Housing Counseling Program policies related to Intermediaries
- Policies re: Intermediaries and policies re: network agencies
- Programmatic compliance and financial compliance
- Clear, consistent and comprehensive guidance about HUD's expectations

Polling Question #1

What resources do you use for information about your role as an Intermediary?

Select all that apply.

- A. Housing Counseling Program Regulation (24 C.F.R. Part 214)
- B. HUD Handbook 7610.1 REV-5
- C. Form HUD-9910
- D. Housing Counseling Grant Agreement
- E. Housing Counseling Capacity Building Toolkit

Polling Question #2

In which areas would you like additional guidelines?

Select all that apply.

- A. Oversight and monitoring of sub-agencies
- B. Accepting new agencies into network
- C. Performance reporting requirements
- D. Other



OHC – Role of Intermediaries

William McKee

Deputy Director
Office of Policy and Grant Administration



Sub-grantees that are also LHCAs

- Intermediaries and State Housing Finance Agencies may have affiliates and sub-grantees that are also Local Housing Counseling Agencies (LHCAs)
- LHCAs currently have a separate approval that is issued directly from HUD

Polling Question #3

In FY 2013 did you have more or less sub-grantees *that are also LHCA*s than in FY 2012?

- A. More LHCA sub-grantees
- B. Less LHCA sub-grantees
- C. The same number of LHCA sub-grantees

Discussion Question

Are there any challenges or issues that arose by virtue of your LHCA/sub-grantees' LHCA status (as compared with your other non-LHCA sub-grantees or affiliates)?

Sub-grantees that are also LHCA's

- HUD often conducts performance reviews of LHCA's that are in need of a re-approval
- Intermediaries, SHFA's and MSO's are also responsible to ensure that the performance of all their sub-grantees, including both LHCA's and non-LHCA affiliates, meet all HUD Regulatory and Handbook requirements - LHCA sub-grantees are therefore monitored by HUD and their respective Intermediary, SHFA or MSO

Sub-grantees that are also LHCAAs

- HUD is looking at how it might reduce the workload for LHCAAs associated with being monitored by both their respective parent organization and directly by HUD during the re-approval process
- HUD is also analyzing the possible role of Intermediaries, SHFAs, and MSOs in HUD's review and/or re-approval of their LHCA sub-grantees



OHC – Role of Intermediaries

Rhonda Rivera

Senior Housing Program Officer
Office of Oversight and Accountability



OHC – Role of Intermediaries

- Intermediary's role regarding oversight and accountability
- As an organization overseeing a network of affiliates, it is required you provide training, technical assistance and supportive services
- HUD 9910 – Performance Review protocol
- HUD 9910I – New Performance Review protocol for intermediary organizations.

Polling Question #4

**What are your top challenges in managing your network?
Select all that apply.**

- A. Training
- B. Quality Control Plan
- C. Monitoring
- D. Record Keeping
- E. Executing sub agreements
- F. Establishing policy on sub-allocating funds
- G. Measuring accomplishments

Discussion Question

What would you like to see OHC do, create, or offer that will assist with the challenges of supporting a network of housing counseling agencies that provide quality services to consumers?



OHC – Role of Intermediaries

Jerrold Mayer

Director

Office of Outreach and Capacity Building



OHC – Role of Intermediaries

Exploring 24 C.F.R. 214 definitions of housing counseling organizations driven by -

- Changes in industry and NOFA process
- Designation of “Local” HCA no longer applicable under OHC structure – not HOC driven



OHC – Role of Intermediaries

Judy Ayers Britton

Housing Specialist

Office of Outreach and Capacity Building



Working with Coalitions

- Working with agencies not approved by HUD
- Office of Housing Counseling's goal
- Outreach to coalitions
- Responses



Concluding Remarks

Ruth Roman

Senior Program Advisor
Office of the Deputy Assistant Secretary
Office of Housing Counseling



Closing Discussion

Any comments about today's topics or any other topics?

- **Evaluation survey will launch after the webinar**
- **Attendees will receive follow up email with survey link**

For More Information

Office of Housing Counseling web page:
www.hud.gov/housingcounseling

Email questions or comments:
housing.counseling@hud.gov